MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet

General Information

Task	Process Information
Creating an Express PO (Purchase Order)	An Express PO is a purchase order created for items under $2500 (or $500 for District Court). This document also serves as a formal purchase order for Blanket Contract vendors requiring one. **NOTE - for AOC, Circuit Courts, Appellate Courts, and Programs:** Per the FY15 Procurement Policy Change, Express POs will no longer be REQUIRED for purchases under the State Contracts/BPOs for purchases less than $2,500. These contracts include Rudolph's Office Supply, Staples, MD Correctional, etc. A voucher (non-PO voucher) can be processed without adding an Express PO. Express POs are optional for these Contracts/BPOs. You may continue to create Express POs if they meet the business practices of your Court or Program, or if they are requested by the vendor. Express POs will continue to be REQUIRED for purchases under the Judiciary Blanket Contracts as a way for the DPCGA to track the contract values. They are also REQUIRED for any purchases under State Contracts/BPOs for purchases over $2,500. A complete list of Contract/BPOs is available on the GEARS Tip Sheet page: http://mdcourts.gov/procurement/pdfs/bpofy2015.pdf . Please be sure to use the exact Vendor ID referenced on the Contract/BPO listing. **NOTE – for District Court:** District Court will continue to REQUIRE Express POs for purchases under the State Contracts/BPOs and the Judiciary Contracts/BPOs.

Before you Begin

If you do NOT know the GEARS Vendor ID to be used on the voucher, you can look it up using the vendor's Tax ID Number. If the Vendor ID is known and has been reviewed for accuracy, you can skip this step and enter the Vendor ID in step 3 below. **Note: Please verify the vendor address to be sure it is accurate. If not, please complete a Vendor Maintenance Form and send it to the Department of Budget and Finance (DBF). The form is available on the GEARS website:** http://mdcourts.gov/gears/forms.html	

GEARS Navigation

Purchasing > Purchase Orders > Add/Update Express POs	ORACLE Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update Express POs

1.0   Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	Select the "Add a New Value" Tab.	**Express Purchase Order** Find an Existing Value Add a New Value
2.	Click the [Add] button.	
3.	**Express Purchase Order** On the **Purchase Order** screen, select / enter Vendor ID (as found in "**Before you Begin**" at the top of this document). **NOTE:** The Buyer should read "FIELD_BUYER".	*PO Date: 10/01/2013 *Vendor: *Vendor ID: *Buyer: FIELD_BUYER

4.	**NOTE: This step is optional.** **Enter PO Reference:**	**OPTIONAL:** In the PO Reference field, enter descriptive information such as your name or court location to make it easier to search for your Express POs later. PO Reference: Sally Sample - Calvert Circuit **To search later:** Favorites	Main Menu > Purchasing > Purchase Orders > Add/Update Express POs **Express Purchase Order** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value	Add a New Value ▼ Search Criteria Business Unit: = PO ID: begins with Purchase Order Date: = PO Status: = Short Vendor Name: begins with Vendor ID: begins with Vendor Name: begins with Buyer: begins with Buyer Name: begins with PO Type: = Purchase Order Reference: contains Sally Hold From Further Processing ☐ Case Sensitive Search Clear Basic Search 💾 Save Search Criteria
5.	**NOTE: Steps 5 through 7 are optional. These steps allow you to change the Billing Location (where the Invoice should be sent).** **Update the Billing Location:** **Click the** Header Details **link.**	**OPTIONAL:** If the invoice needs to be sent to a separate location, other than where the goods were shipped, enter the billing location. Header Details Activity Summary PO Defaults Add Comments PO Activities Add ShipTo Comments

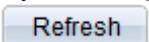| 6.	NOTE: Steps 5 through 7 are optional. These steps allow you to change the Billing Location (where the Invoice should be sent). Enter the Billing Location or click the 🔍 magnifying glass to select the Billing Location.	
7.	NOTE: Steps 5 through 7 are optional. These steps allow you to change the Billing Location (where the Invoice should be sent). Click the Billing Address link to verify the Bill To Address. Click the OK button and continue creating the PO.	

8.	**NOTE: Steps 8 through 11 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.** **Click on the PO Defaults Link.**	
9.	**NOTE: Steps 8 through 11 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.** **Enter your SpeedChart (PCA) and then click** Refresh **.**	

10.	**NOTE: Steps 8 through 11 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.** **Entering a SpeedChart will fill in your Chartfield values (i.e., accounting codes), with the exception of the "Account" (i.e. sub-object) and "Approp Yr" (i.e. fiscal year).** **NOTES:** **A. For FY16 transactions and forward, Account and Approp Yr are no longer allowed defaults. These two fields will be populated in later steps.** **B. Other defaults may be entered, such as Ship To.** **C. The defaults entered here will populate ALL distribution lines.**	
11.	**NOTE: Steps 8 through 11 are optional. These steps allow you to set SpeedChart and other defaults for the lines on your PO.** **Click on** [OK]	

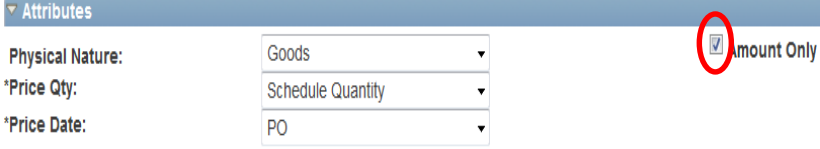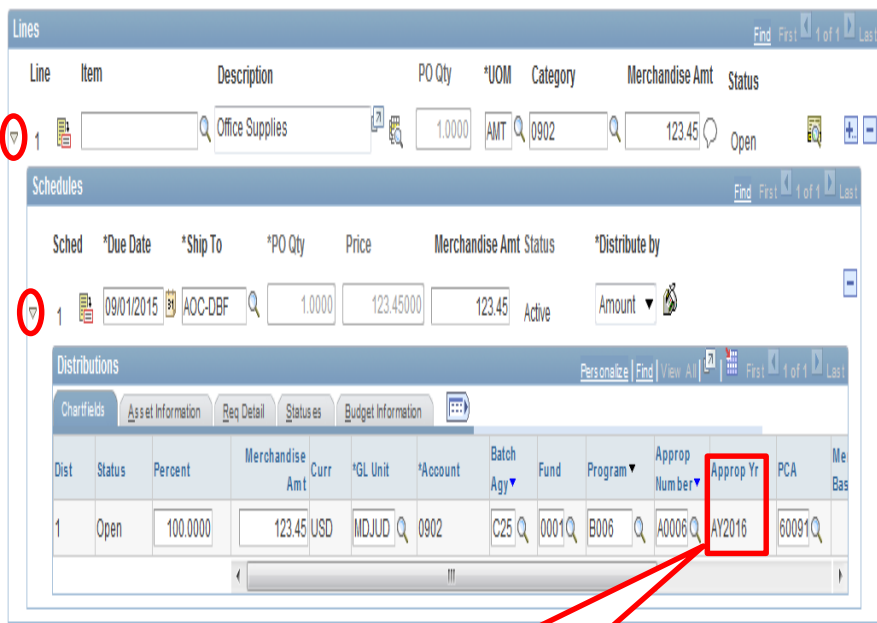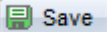| 12. | NOTE: Repeat steps 12 through 16 for each line on your Express PO.

Enter Line information: | Fill in the following fields: **Description, PO Qty, UOM and Category.**

NOTES:

• You *must* enter a Description and other line information. Failure to do so may cause unexpected results.

• You *must* set-up your Express PO in the manner in which you wish to Receive (i.e. Quantity or Amount).

• To add or delete a line, click on the "+" or "-" to the right of the line.

• **If you are creating an amount only PO, your UOM should be AMT.**

• **If you are purchasing against a Blanket Contract,** please enter a category code applicable to the contract. If you do NOT know the category code(s) applicable to the contract, you can leave the category blank. When step 14 has been completed, the category will default onto your PO line. **NOTE:** If the wrong category is entered on the PO line, the Category Line Number(s) from the blanket contract may not be retrieved correctly in step 14.

• **If you are NOT purchasing against a Blanket Contract,** please enter the appropriate category for the line.

• **For FY16 transactions and forward:**
The **MDJUD Item Catalog** and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog **MDJUD Item Catalog NEW**. The category codes contained in this new catalog are the same as our existing account codes. This enhancement is intended to eliminate some of the guesswork in choosing a category. If you know the appropriate account code for your purchase, the category code will be the same.

For example, if the account code to be used on your distribution line is 0902 (Office Supplies), you would choose 0902 as the category.
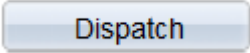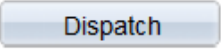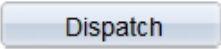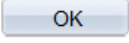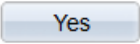
NOTE: The **JIS Item Catalog** (for IT Equipment/Services) and the **District Court Item Catalog** (for Police Supplies) will remain the same. Please continue to use these where appropriate. For example, if you are ordering IT equipment or services that need to be routed to JIS for approval, you should choose a category from the JIS Item Catalog as you do today.

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| 13.	For "Amount Only" Express POs – **NOTE: Repeat steps 12 through 16 for each line on your Express PO.** *However, if your Express PO is not distributed by Amount Only but by Quantity, omit this step.* **On the** Express Purchase Order Details for Line 1 **screen:**	If you are creating an "Amount Only" Express PO, click on the Line Details icon . Under the **Attributes** section: • Check the Amount Only checkbox. • If you are done with all line details, click **"OK"** to return to the Express PO line. **NOTE**: When exiting the Line Details screen, "Amount Only" Express POs will display a Message indicating that the PO Qty will be set to "1". Click "Yes" to acknowledge.
14.	To reference Blanket Contracts – **NOTE: Repeat steps 12 through 16 for each line on your Express PO.** *However, If your Express PO is not against a Blanket Contract, omit this step.* **On the** Express Purchase Order Details for Line 1 **screen:**	If you are creating an Express PO against a Blanket Contract, you must reference the contract by clicking the Line Details icon . Under the **Contract** section: • Search for the Contract ID – the contract(s) established against the vendor you have specified will display. Choose the applicable contract. • Search for the Category Line Number – Choose the appropriate category line. The category associated with this category line will default onto your PO line. • If you are done with all line details, click **"OK"** to return to the Express PO line. **NOTE**: When exiting the Line Details screen, "Amount Only" Express POs will display a Message indicating that the PO Qty will be set to "1". Click "Yes" to acknowledge.

15.	**For DISTRICT COURT Express POs –** **NOTE: Repeat steps 12 through 16 for <u>each line</u> on your Express PO.** *However, if your Express PO is <u>not</u> for District Court, omit this step.* **Express Purchase Order** **On the Details for Line 1 screen:**	**NOTE:** This step is for DISTRICT COURT only. Receiving is required for DC Express POs. If you are creating an Express PO for District Court, click on the Line Details icon . Under the **Receiving** Section: • Select "Required" in the drop-down for Receiving Required. **Receiving** *Receiving Required: [Required ▼] ☐ Close Short ☐ Inspection Required Inspect ID: [ ] • If you are done with all line details, click **"OK"** to return to the Express PO line. **NOTE**: When exiting the Line Details screen, "Amount Only" Express POs will display a Message indicating that the PO Qty will be set to "1". Click "Yes" to acknowledge.
16.	**NOTE: Repeat steps 12 through 16 for <u>each line</u> on your Express PO.** **Express Purchase Order** **On the Purchase Order screen:** **The following are required fields:** • **Lines**: Description, PO Qty, UOM, Category. • **Schedules**: Due Date, Ship To, Price/Merchandise Amt. **NOTE**: If UOM on the line is anything other than "AMT", enter the unit price in the "Price" field, else enter the amount in the "Merchandise Amt" field. • **Distributions**: Account, Batch Agy, Fund, Program, Approp #, Approp Yr & PCA. • **NOTE: For FY16 transactions and forward (EXCEPT FOR JIS AND DC POLICE SUPPLIES):** The "Account" (i.e. sub-object) should be the same as the category. You cannot change the account. If a change is needed, go back and change the category. The account will be changed automatically, to match the category. • **NOTE: For FY16 transactions and forward Approp Yr will be defaulted to "AY2016", or current Approp Year.**	Once you are back on the Express PO line, expand the Express PO sections using the ▷ icons to the left of the Line and Schedule or use the **Expand All** link. *Defaulted Approp Year*

17.	Click the 💾 Save button.	
18.	**Confirm your Express PO is saved.**	If the Express PO has been saved, you will have a (10) digit Purchase Order ID. Express Purchase Order **Purchase Order** Business Unit: MDJUD PO Status: Open PO ID: 0000000148 Budget Status: Not Chk'd
19.	**To add Comments and Attachments:**	**General Express PO comments/attachments:** • click the Add Comments Header link • select a group to display your comments to: ☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher ☐ Approval Justification **Line specific comments/attachments:** • click the 💬 icon to the right of the Express PO Line • select a group to display your comments to ☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher
20.	**Submit Express PO for approval.**	Select the ✅ to submit your Express PO for approval. **NOTE:** You cannot move forward with the remaining steps until the Express PO has been approved. You will receive an email notification when it has been approved.
21.	**Budget Check your Express PO.**	Only upon an "**Approved**" PO Status will you be able to run the Budget Check process by clicking the Budget Check icon 🔍. **PO Status:** Approved **Budget Status:** Not Chk'd 🔍

22.	Dispatch your Express PO.	Only upon an "**Approved**" PO Status and a "**Valid**" Budget Status will you be able to run the Dispatch process by clicking the [Dispatch] button. **NOTE**: Dispatching your Express PO is required in order to Receive and Voucher against the Express PO. **Dispatch Method:** Print ▼ [Dispatch] **NOTE**: The Dispatch Method defaults to "Print" but can be changed to "Email" for those vendors who have an email address associated with their vendor information on the Vendor Master File maintained by DBF. **Dispatch Method:** Email ▼ [Dispatch]
23.	Confirm the Dispatch Options & complete your Express PO.	Dispatching via the "Print" method will display the following Dispatch Options. **Dispatch Options** Fax Cover Page: ____ □ Test Dispatch Server Name: ____ 🔍 □ Print BU Comments *Output Destination Type: WEB ▼ □ Print Duplicate on PO □ Print Changes Only Output Destination Format: PDF ▼ ☑ Print PO Item Description Template ID: ____ 🔍 □ Print Copy There is no need to alter these options, just click the [OK] button, then select [Yes] on the pop-up message to wait for the Dispatch process to complete. Waiting for this process to complete will allow you to view the Express PO status as Dispatched. **NOTE**: You can click "No" rather than waiting for the Dispatch process to complete, however you will have to look up your Express PO to view the Dispatched status.
24.	Your Express PO is complete.	You will see the PO Status as "Dispatched" when the Dispatch process completes. **PO Status:** Dispatched **Budget Status:** Valid **NOTE:** The Express Purchase Order must have these statuses to be received and vouchered against.

25.	Once Dispatched, you can review the PDF version of the Express Purchase Order in your Report Manager under the Administration Tab. Reporting Tools > Reporting Manager

🛑 **Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.